1 Digital Document Access (DDA)

DDA: What is Contained in this Chapter
Overview and Home Page
Retrieving Case Documents
View Documents Page:
Split View
Merge View
Printing Pages and/or Documents
Deleting Pages and/or Documents
Moving Documents to a Different Storage Location
Changing a Document Type
Splitting a Document
Merging Documents
Restoring a Document

1.1 Using Various Functions in DDA

DDA provides an authorized user the ability to search all committed imaged files across company repositories. Data can be retrieved using a variety of search fields/criteria for documents located in different storage locations. Once accessed, document information can be reorganized with the Split and Merge functions of DDA and also recovered using the Restore function.

1.2 Understanding Different Areas of the DDA Home Page

The Advanced Search panel (available to certain authorized users) on the right side of the DDA home page is used to search for case files using a variety of search criteria (Case Number, Last Name plus Social Security Number or Social Security Number only, e-QIP Request Number, Barcode ID, Captiva Batch ID, and COMPANY Storage Location: All Authorized Locations, Unacceptable, Open, Closed, Document Review, and Trash Documents.).

After entering search criteria (case number or last name plus social security number or e-QIP request number, etc.), click the Search button (bottom right of page, in Advanced Search area). To start over with different search criteria, select the Clear button (bottom right of page next to the Search button).

The Advanced Search panel is used to locate documents using search criteria such as, Case Number, Social Security Number, Last Name, e-QIP Number, and Storage Location.

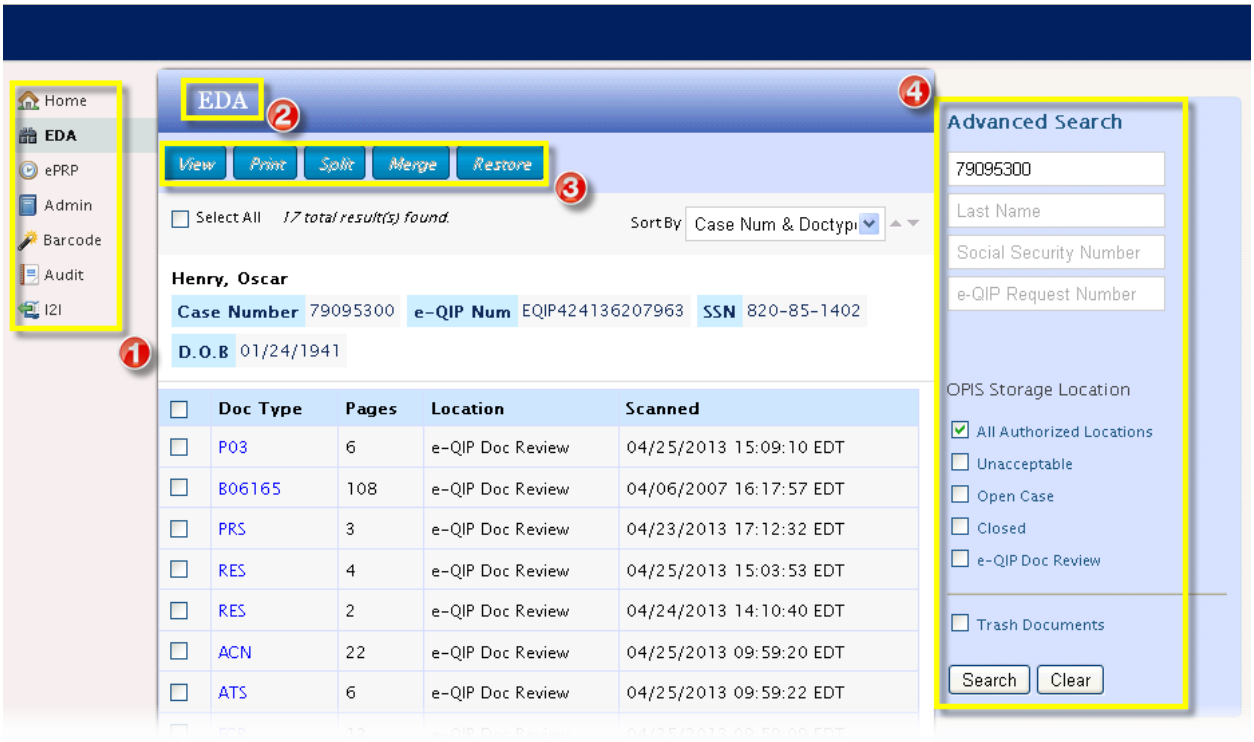
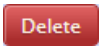
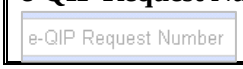


Figure 1-1. DDA Home Page.

(1) Transformed COMPANYApplication Menu (Modules)
(2) DDA Home Page
(3) Toolbar Buttons (View, Print, Split, Merge, Restore)
(4) Advanced Search

The Storage Location available to a user is determined by the user's login permissions and credentials. An "authorized user" only sees the areas of the system, buttons, drop-down menus, etc., that are granted at login.

Table 1-1. DDA Field/Button Descriptions.

Fields/Buttons	*Description*
View	A document's contents can be viewed with or without performing an action.
Print	A document can be printed by an authorized user.
Split	Documents with two or more pages can be split into multiple, separate documents, up to the total number of pages in the document.
Merge	Two or more documents within the same case can be merged to create one document. The total number of documents to be merged can be up to the total number of documents contained in the case.
Restore	Deleted or modified documents are held in the Trash Storage Location of the system and can be restored if/when needed.
Delete 	The Delete button is used to delete a document or specific document pages from a search selection on the DDA Home page.
Move To	The Move To button is used to move a selected document from one Storage Location to another Storage Location selected from a drop-down menu of those available).
Sort by	Documents on the page can be sorted by Case Number and Document Type, Document Type, Subject Last Name, Subject SSN, Case Number, e-QIP Request Number, Storage Location, and Scan Date within ascending or descending order.
Up / Down Arrows	Buttons to switch the data display in ascending (up direction) order and descending (down direction) order in the Sort by field.
Advanced Search	Use various criteria to narrow or widen a search for documents.
Case Number	Enter a case number to search for all of its associated documents.
Last Name (Subject)	Enter a subject's last name (full, last name or the first five characters, plus a secondary search field to ensure retrieval accuracy) to search for all of the documents associated with a subject.
Social Security Number	Enter a social security number to search for all of the documents associated with a subject's social security number.
e-QIP Request Number 	Select to search for an e-QIP request number.

Fields/Buttons	*Description*
Storage Location: OPIS Storage Location	The user only sees the storage location(s) that s/he has access to. Searches can be narrowed to one or more storage locations by selecting the corresponding check box.
All Authorized Locations ☐ All Authorized Locations	All of the locations available to the authorized user.
Unacceptable ☐ Unacceptable	Documents that have been labeled unacceptable for various reasons (such as, incorrect data).
Open ☐ Open Case	Documents that are currently open and need further action.
Closed ☐ Closed	Documents that have been closed and do not require further action.
e-QIP Document Review ☐ e-QIP Doc Review	Documents that are in the process of review.
Trash Documents ☐ Trash Documents	Original documents prior to a modification or deletion.
Search Search	Enter or select search criteria in the Advanced Search panel and click the search button.
Clear Clear	Click the Clear button to clear search selections (such as, case number, last name, e-QIP number, or storage location).

1.3 Retrieving Case Documents

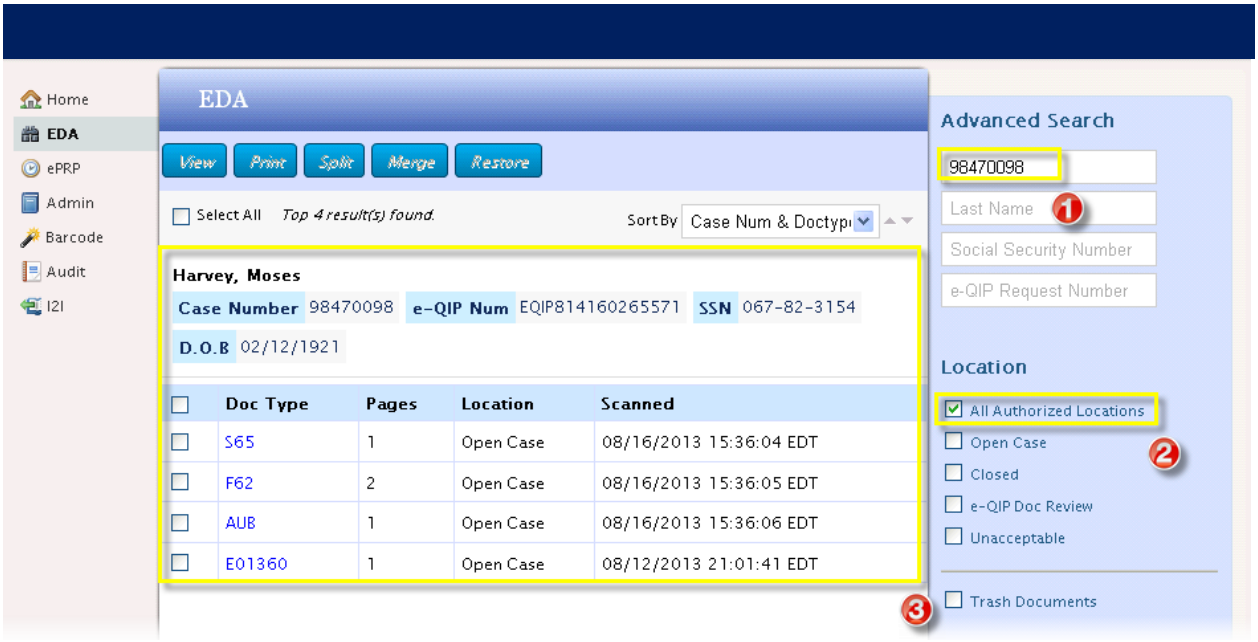
Documents can be retrieved through various search criteria using the **Advanced Search** panel (right side of the page). Depending on what the user needs to do, documents can be selected for viewing, printing, splitting, merging, deleting, or restoring.

The system allows authorized users to search for documents associated with a particular **Subject** using one or more of the following search fields:

- Case Number (Note: A Last Name search should include up to the first five letters of the name *plus* a secondary search field of SSN, Case Number, or e-QIP Request Number)
- Last Name,
- Social Security Number,
- e-QIP Request Number

1.3.1 Summary of Steps for Retrieving Case Documents

- Go to the **DDA Ho**me page.
- Enter the search criteria in the **Advanced Sea**rch panel (right side of page).
- Select a specific **Storage Location** or use the default – "All Authorized Locations."
- Select the "**Trashed Documents**" Storage Location to **View** or **Restore** a modified document.
- Click the **Search** button (bottom of search panel).
- The search results will display in the center of the page.



(1) Case Number Search Field
(2) Queue Selection
(3) Search Results Area

1.4 Selecting Toolbar Buttons

The **View**, **Print**, **Split**, **Merge**, and **Restore** buttons are available according to the user's document selection.

The **View**, **Print**, and **Merge** buttons become available after selecting two or more documents in a case file.

The **View**, **Print**, and **Split** buttons become available when one document containing two or more pages is selected.

The **Split** and **Merge** buttons will never be available at the same time since the conditions that activate one will deactivate the other. That is, if more than one document is selected, the **Merge** button is available and the **Split** button is not. And then, if one document with two or more pages is selected, the **Split** button is available and the **Merge** button is not.

The **View** and **Restore** buttons are available when a single document has been selected in the **Trash Storage location**. Only one document can be restored at a time, so if more than one document is selected, the **Restore** button will not be available, but then the **Print** button will become active.

If documents are selected from more than one case file, or multiple documents are selected from the **Trash Storage** location, only the **View** and **Print** buttons are available. That is, a user can view and print multiple documents for multiple cases, or multiple documents in the **Trash Storage** location, but the **Merge**, **Split**, and **Restore** actions can only be performed on documents within one case or one document at a time, respectively. The **View** button can be used to review document contents with or without taking any additional action.

1.4.1 Summary of Steps for Selecting Toolbar Buttons

- Search for or retrieve case documents from the **DDA Home** page.
- Select one or more documents from the search results.
- Select the needed button from the **Toolbar** (View, Print, Split, Merge, Delete, or Restore).
- Perform the required operation after selecting the button.
- When all operations are complete, exit the **DDA module** or log out of the **COMPANY environment**, as needed.

1.5 Viewing a Document in DDA

The **View Document(s)** page is a separate browser window that is launched when the user selects the **View** button on the **DDA Home** page. A user can view the selected item contents with or without performing any additional operations (such as, Split, Merge, or Delete). If a **Split** or **Merge** function is needed, the **View** function can be used to review contents and/or determine how the pages or items could be organized prior to taking further action.

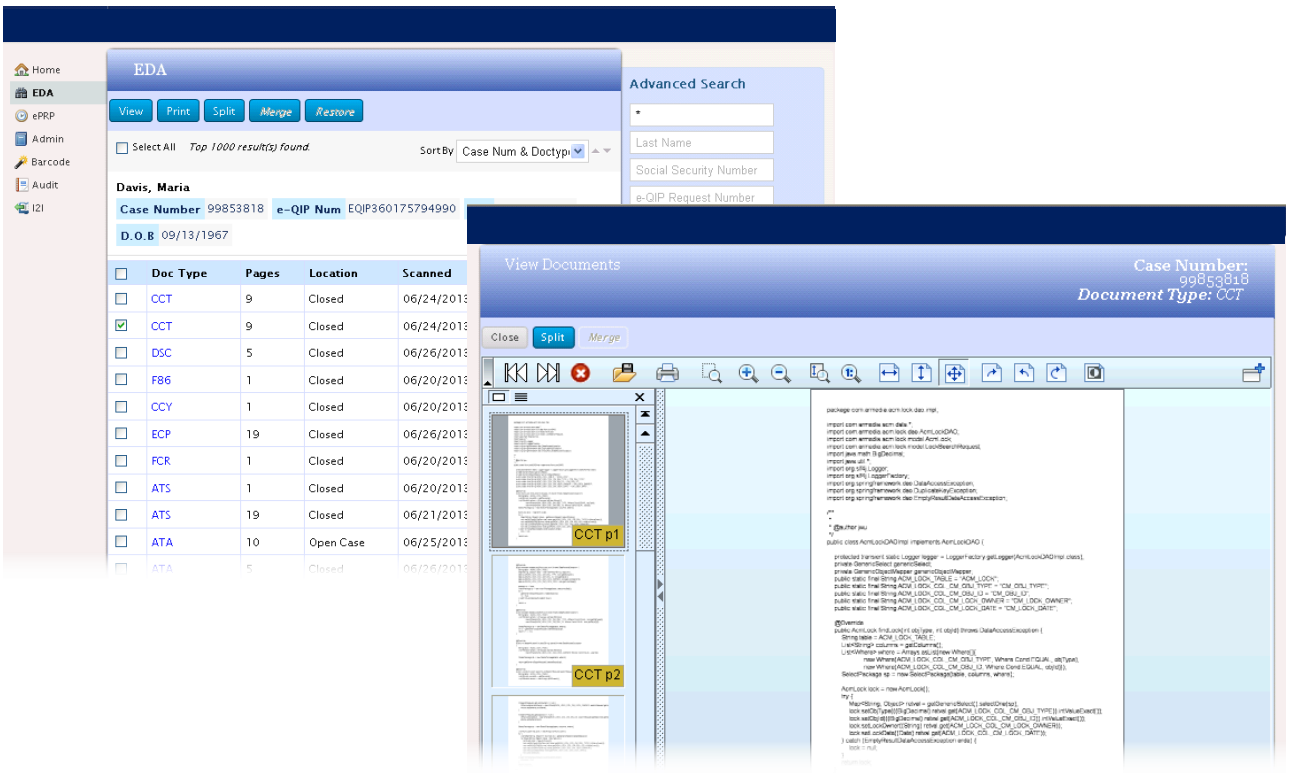


Figure 1-2. DDA Home Page and Daeja Viewer Page.

Toolbar Buttons change according to the selection(s).
If more than one document is selected, the Merge button is available and the Split button is not.
If one document with two or more pages is selected (only), then the Split button is available and the Merge button is not.

Split Function Limits: Documents with two or more pages can be split into multiple, separate documents, up to the total number of pages in the document. For example, a document with five pages could be split into a maximum of five separate documents.

1.6 Viewing a Document with a Split Selection

To view an item with the **Split** function activated, the user selects one document with two or more pages from the DDA Home page and then selects the **View** button. Selecting the **View** button launches the **View Documents** browser window.

The user can view the document without taking any action by selecting the **Close** button. This will return the user to the **DDA Home** page with the initial search results displayed. The user can also select the **Split** button to work on the document further, which will launch the **Split Document** browser window.

1.6.1 Summary of Steps for Viewing a Document with a Split Selection:

- Search for or retrieve a case item with two or more pages from the **DDA Home** page.
- Select the **View** button.
- In the new browser window, select the **Split** button to work on the item further.
- Or, select the **Close** button to exit the **View Document(s)** browser window and return to the **DDA Home** page, which displays the initial search results.
- To see how to Split a document, go to Summary of Steps for Splitting a Document.

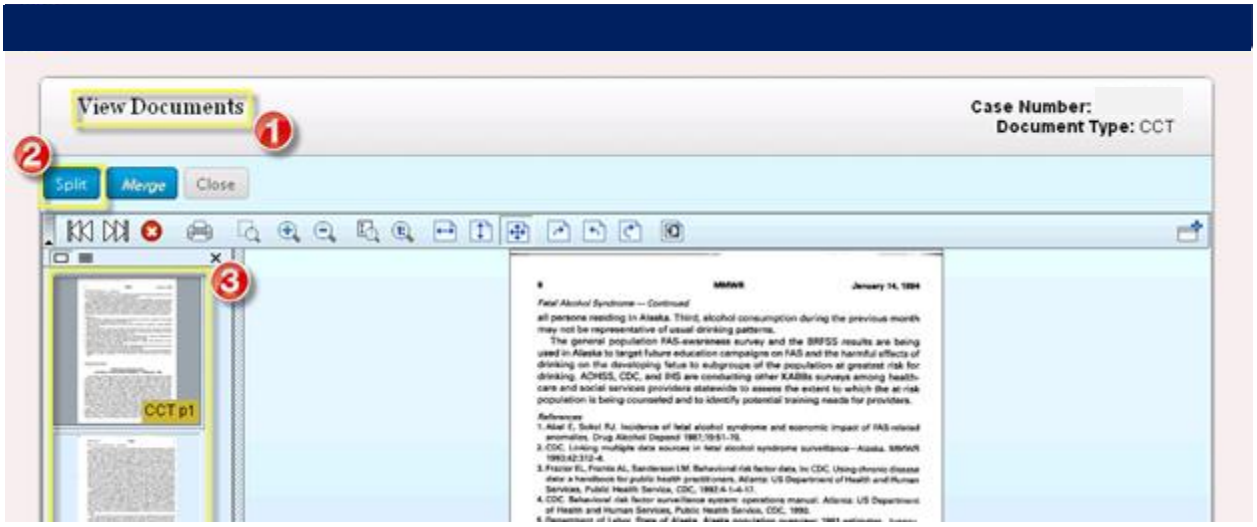


Figure 1-3. DDA View Document (Split).

(1) View Documents Browser Window
(2) Split Button
(3) Daeja Viewer Page Icon Display Area

Merge Function Limits: Two or more documents within the same case can be merged to create one new document. The total number of documents to be merged are limited to the total number of documents contained in the case.

1.7 Using the View Documents Page (Merge Selection)

To view documents with the **Merge** function activated, the user selects two or more documents from the DDA Home page and then selects the **View** button. Selecting the **View** button launches the **View Documents** browser window.

The user can view the document without taking any action by selecting the **Close** button. This will return the user to the **DDA Home** page with the initial search results displayed. The user can also select the **Merge** button to work on the document further, which will launch the **Merge Documents** browser window.

1.7.1 Summary of Steps for Using the View Function (Merge Selection):

- Search for or retrieve two or more case items from the **DDA Home** page.
- Select the **View** button.
- In the new browser window, select the **Merge** button to work on the items further.
- Or, select the **Close** button to exit the **View Document(s)** browser window and return to the **DDA Home** page, which displays the initial search results.
- To see how to Merge two or more documents, go to Summary of Steps for Merging Two or More Documents.

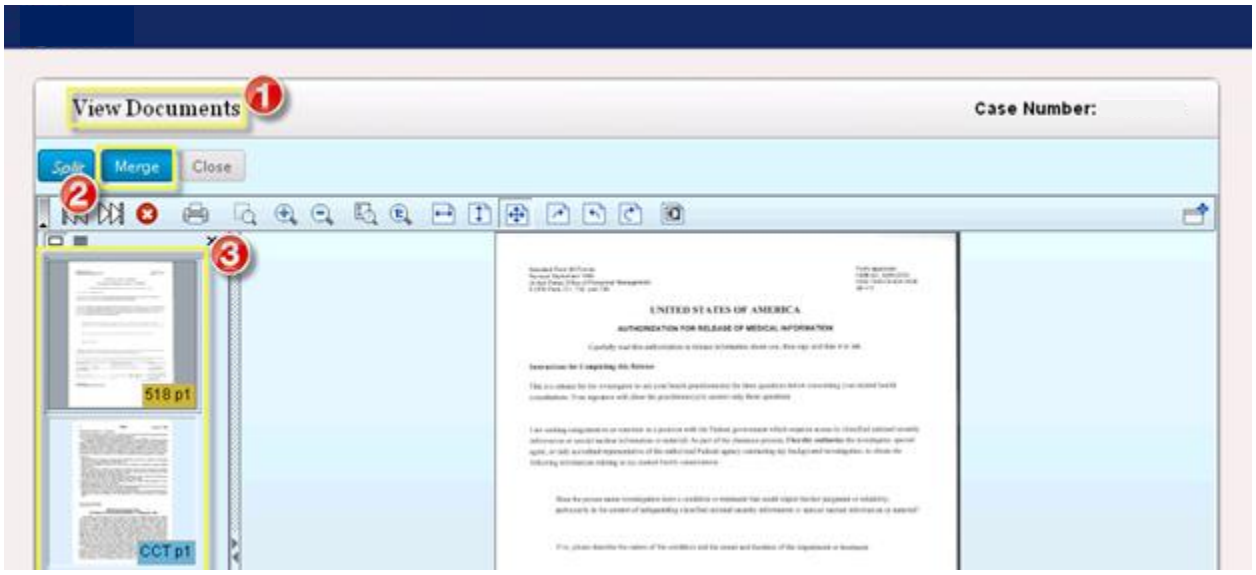


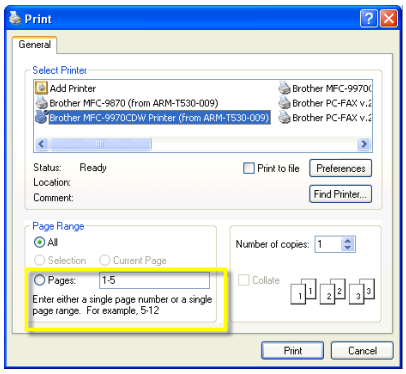
Figure 1-4. DDA View Document (Merge).

(1) View Documents Browser Window
(2) Merge Button
(3) Daeja Viewer Page Icon Display Area

1.8 Printing a Document

Authorized users can print documents or pages from different browser windows in DDA. On DDA's Home page there is a **Print** button. On the other browser windows (View Document, Split Document, Merge Documents), the print function can be accessed using the print icon.

1.8.1 Summary of Steps for Printing a Document



- Search for or retrieve documents from the **DDA Home** page. Select one or more documents.
- Select the **Print** button.
- A Printer dialog box opens with a list of the available printers and printing options.
- Select the pages for printing and any printing options, then select **Print**.
- Or, select the **Cancel** button to exit the Print function and return to the last page accessed prior to selecting **Print**.

1.9 Deleting Page(s) and/or Documents

The **Delete** function can be done from different browser windows in DDA. On **DDA's Home page** there is a **Delete document** button in the Toolbar and a **Delete pages** icon next to the document's page count. On the other browser windows (View Document, Split Document, Merge Documents), the delete function can be accessed using a **Delete** button and the "**X**" icon.

1.9.1 Summary of Steps for Deleting Page(s) and/or Documents

- Search for or retrieve documents from the **DDA Home** page. Select one or more documents.
- Select the **Delete** button.
- A **Delete dialog box** opens with the option to delete the selected documents or cancel the operation.
- Select the **Confirm Delete** button to complete the delete operation.
- Or, select the **Cancel** button to exit the Delete operation.
- The user is returned to **DDA's Home** page with prior search results displayed.

1.10 Moving Documents to a Different Storage Location

A document can be assigned to a different Storage location on DDA's Home page using the **Move To** button. The Storage Locations available, according to a user's login permissions, are: All Authorized Locations (default), Open Case, Closed, e-QIP Doc Review, Unacceptable, and Trashed Documents.

1.10.1 Summary of Steps for Moving Documents to a Different Storage Location

- Search for or retrieve a document from the **DDA Home** page. Select a document.
- Select the **Move To** button from the Toolbar.
- A **Storage Location dialog box** opens with a drop-down menu of available Storage Locations where the user can move the document.
- Select a **Storage Location** from the list.
- Or, select the **Cancel** button to exit the **Move To** Storage Location operation.
- The user is returned to **DDA's Home** page.

1.11 Changing the Document Type

A document can be assigned a different document type (Doc Type) on DDA's Home page using the **Edit DocType** function once the document is selected. Available document types can be selected from a drop down list when the user clicks on the **Edit DocType** icon.

1.11.1 Summary of Steps for Changing the Document Type

- Search for or retrieve a document from the **DDA Home** page. Select a document.
- Select the **Edit DocType** icon next to the DocType label in the document details.
- A **DocType dialog box** opens with the option to select a new DocType or cancel the **Change DocType** operation.
- Select the S**ave** button to confirm the DocType selection.
- Or, select the **Cancel** button to exit the **Change DocType** operation.
- The user is returned to **DDA's Home** page with prior search results displayed.

1.12 Splitting a Document in DDA

The **Split** feature in the DDA module allows for one document with two or more pages to be separated into different documents, up to the total number of pages contained in the document being split. For example, one document containing three pages can be split into three separate documents using the Split operation. The new documents can be assigned whatever DocType is required. Some of the benefits and uses of the Split function include:

- Organizing document information into additional, separate documents.
- Saving new documents as different document types (for example, B0, C0, D0).

Once a document has been retrieved and selected, the user selects the **Split** button from DDA's Home page Toolbar and launches the **Split Document** browser window.

1.13 Using the Daeja Viewer Tool when Splitting a Document

After clicking the **Split** button, the **Split Document** browser window launches, displaying all document pages in the Daeja Viewer. The **Daeja Viewer** has two main display areas, the orientation of which can be changed depending on the user's preference. One area shows a large image of the first page of the document (or a selected page) and the second area of the viewer shows all additional pages as icons – that is, a smaller view of each page.

The Page Icon Thumbnails have color labels (bottom right corner of icon) with the DocType and Page Number.

The Daeja Viewer Toolbar and Buttons are used to view, print, manipulate or gain a different perspective (thumbnails on or off, zoom, rotate, invert, and so on) of the image shown in the main viewer area as well as the pages in the thumbnails.

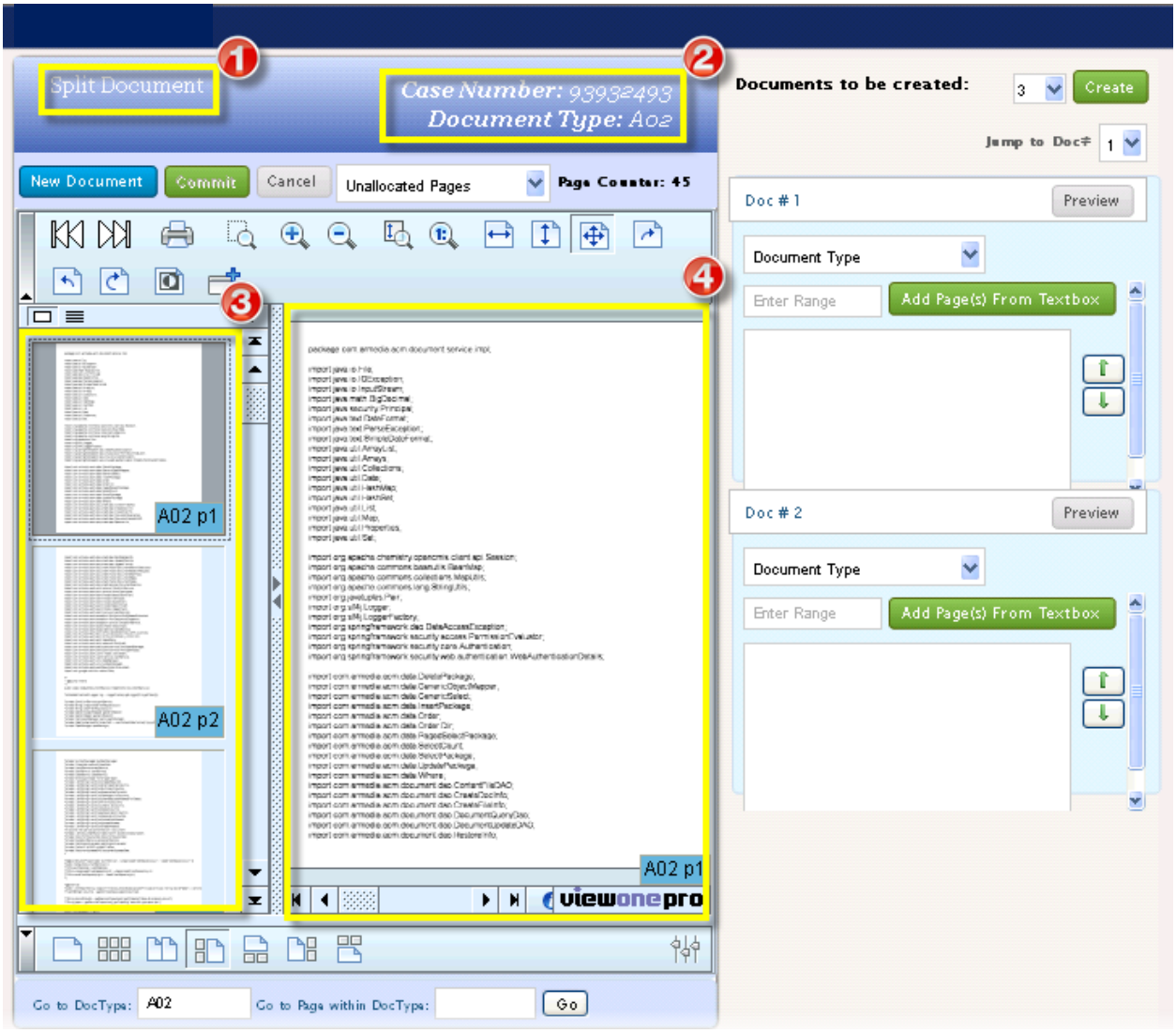
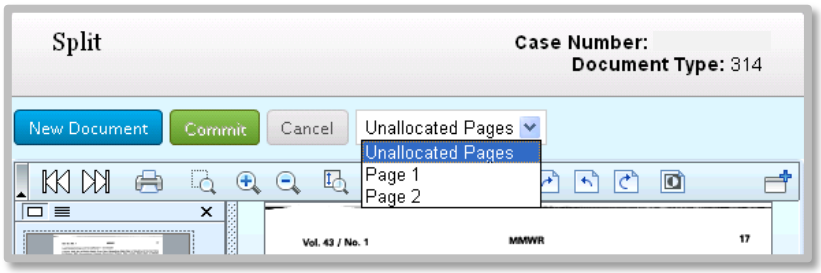


Figure 1-5. DDA Split Feature, New Browser with Daeja Viewer.

(1) Split Document Page
(2) Document Details
(3) Daeja Viewer Thumbnail View (small image)
(4) Daeja Viewer Main View (large image)

1.14 Selecting Toolbar Buttons and Menus on the Split Documents Page

There are three main buttons on the Split page - **New Document**, **Commit**, and **Cancel.** Next to the Toolbar is the **Unallocated Pages** drop down menu. The **New Document** button creates a new target document.

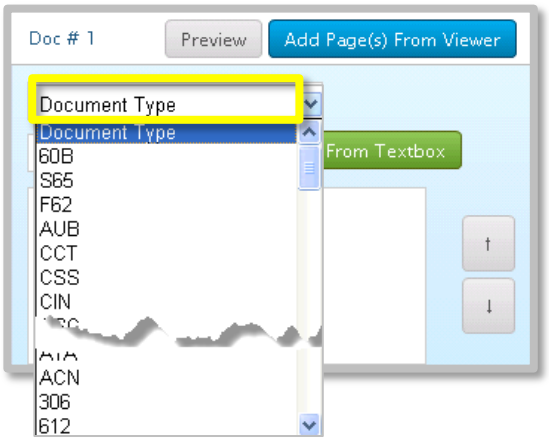


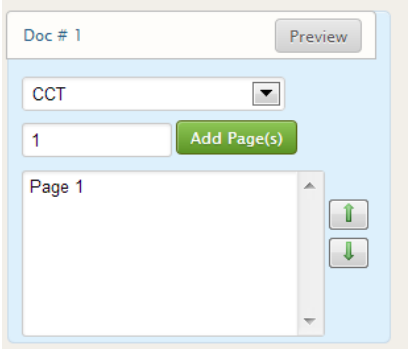
By default, two target documents are available immediately when the Split page is launched since that is the minimum number of documents required for a split action/operation. The **Commit** button is selected after the target documents have been completed and all pages are allocated. At any point, the user can select **Cancel** before selecting **Commit** to exit the **Split Document** page and return to the **DDA Home** page without making any changes to the documents or storage location (repository).

Pages that are displayed in the **Daeja Viewer** are listed by number in the **Unallocated Pages** drop down menu (that is, Page 1, Page 2, Page 3, and so on to the total number of pages).

The user first selects the number of new target documents to create using the New Document button in the Toolbar. The maximum number of new target document s that can be created is equal to the total number of pages in the document (that is, if the document contains four pages, the maximum number of pages it can be split into is four). If the **New Document** button is selected *after* the maximum number of documents has been created, a system error message will display indicating the maximum number of new documents has been exceeded.

Once the number of new target documents has been selected, the pages of the original target document must be allocated to the new target documents and assigned a document type (available from the drop down menu).





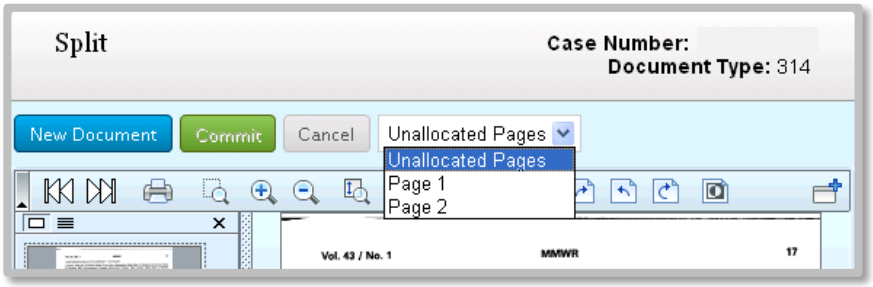
Pages can be added to the target documents via the Add Page(s) text box. Type in the page number or page range (e.g., 1, 4, 1-3, etc.) for each target document until all pages from the original file to be split are allocated. After allocating pages to new target documents, each new target document can be previewed, prior to committing the pages.

Extra target documents can be deleted by clicking the red **X** in the right hand corner of the target document. However, because at least two new target documents are required when splitting a document, the initial two (mandatory) documents (Doc #1 and Doc #2) cannot be deleted.

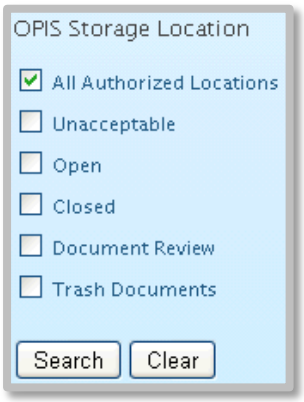
1.15 Completing the Split Function

When all pages have been allocated and assigned a document type, click the **Commit** button. Select **Cancel** at any point before selecting **Commit** to exit the Split page and return to the DDA Home page without making any changes to the documents or storage location (repository).

After selecting **Commit,** the user is returned to the DDA module home page where the initial search results are displayed. The documents that were most recently split and committed to COMPANY will be highlighted. This is how the user can confirm that the documents were split and assigned the correct document type.



The original document can be found in the **Trash Documents Storage Location**. To retrieve the original document, search by its case number with the **Trash Storage Location** selected. This functionality is available according to user role and login permissions. That is, only authorized users can perform Split and Merge functions and access the Trash Storage Location.



1.15.1 Summary of Steps for Splitting a Document

- Search for or retrieve a document from the **DDA Home** page. Select one document with two or more pages to split into separate documents.
- Select the **Split** button from the Toolbar (this action launches the **Split Document** browser window).
- Create the number of new target documents needed by selecting the **New Document** button on the Toolbar. (Note: the maximum number of target documents equals the total number of pages in the original document being split.)
- After creating the needed target documents, every page from the original document being split must be allocated to the new target documents.
- Type the page numbers (for example, 1, 3, 5, etc.) or page sequence (for example, 1-10, 25-50, etc.) for each target document into the **Add Page(s)** textbox.
- To change the order of the pages added to the target documents, use the up and down arrows on the right side of the target document page number display area.
- Assign an available document type to each target document using the drop down menu located below the target document label and preview button (Doc #1, Doc #2, Doc #3, and so on).
- To preview the new target document contents prior to saving and committing the changes, select the **Preview** button for each target document.
- At any point prior to saving and committing the changes to the system, the **Cancel** button can be selected which will return the user to the **DDA Home** page where the user's initial search results will be displayed.
- When all pages have been allocated to new target documents and assigned a document type, select the **Commit** button.
- A system message will display indicating the split operation is in progress.
- The new documents will be available to retrieve through a search (using case number or other search criteria) on the **DDA Home** page.
- The original (single) document will be saved and available to restore if needed in the **Trash Documents** Storage Location.

1.16 Merging a Document in DDA

The **Merge** feature in the DDA module allows for two or documents from the same case to be merged into one, new, target document. For example, if a case has two documents, one with two pages and the other with three pages, both documents can be merged into a new target document with a total of five pages.

Some of the benefits and uses of the **Merge** function include:

- Organizing multiple related or linked documents into one single document.
- Saving a new target document as a different document type (i.e., B0, C0, D0).

The **Advanced Search** panel on the right side of the page is used to search for case files using a variety of search criteria (Case Number, Last Name plus a secondary search field, Social Security Number, e-QIP Request Number, and COMPANY Storage Location, which includes: All Authorized Locations, Unacceptable, Open, Closed, Document Review, and Trash Documents).

After entering search criteria (case number or last name plus social security number or e-QIP request number, and so forth), click the **Search** button (bottom right of Advanced Search panel). To start over with different search criteria, select the Clear button (bottom right of page next to the **Search** button).

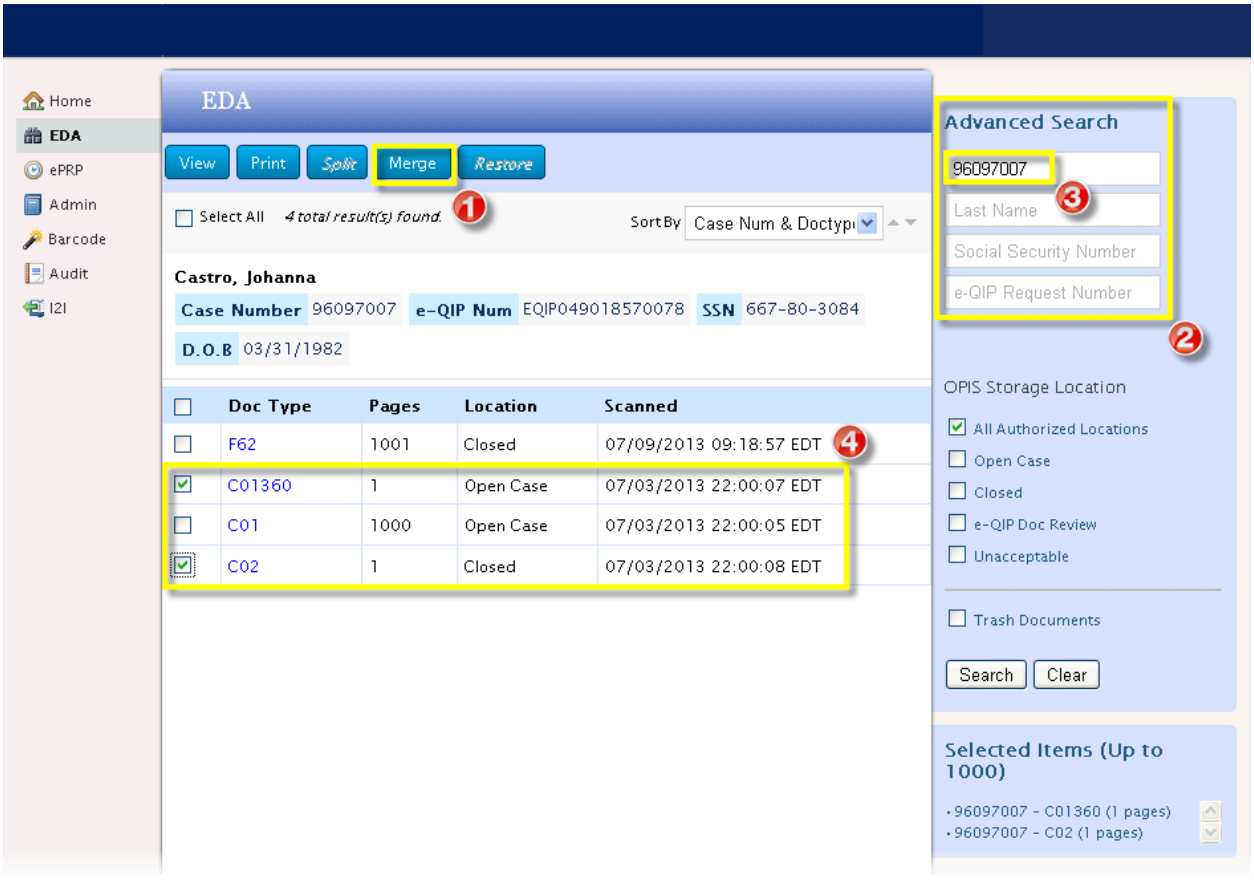


Figure 1-6. DDA Home Page, Case Number Search (Merge Button enabled).

(1) Active Merge Button
(2) Advanced Search
(3) Case Number Search Field
(4) Merge Selection (two documents)

The **View**, **Print**, **Split**, **Merge**, **Delete**, and **Restore** buttons are unavailable until search results are returned and selected.

The **View**, **Print**, and **Merge** buttons become available after selecting two or more documents in a case file. If additional documents are selected from more than one case file, only the **View** and **Print** buttons are available. That is, a user can view and print multiple documents for multiple cases but the merge and split actions can only be taken on documents within one case at a time.

The **View** button can be used to preview document(s) with or without taking an action.

After clicking the **Merge** button, the **Merge Documents** browser window launches which displays all of the pages of the selected documents in a **Daeja Viewer** tool (by default, the main page or selected page shows in the main viewing panel and the others are shown as thumbnails – although there are other viewing options as well).

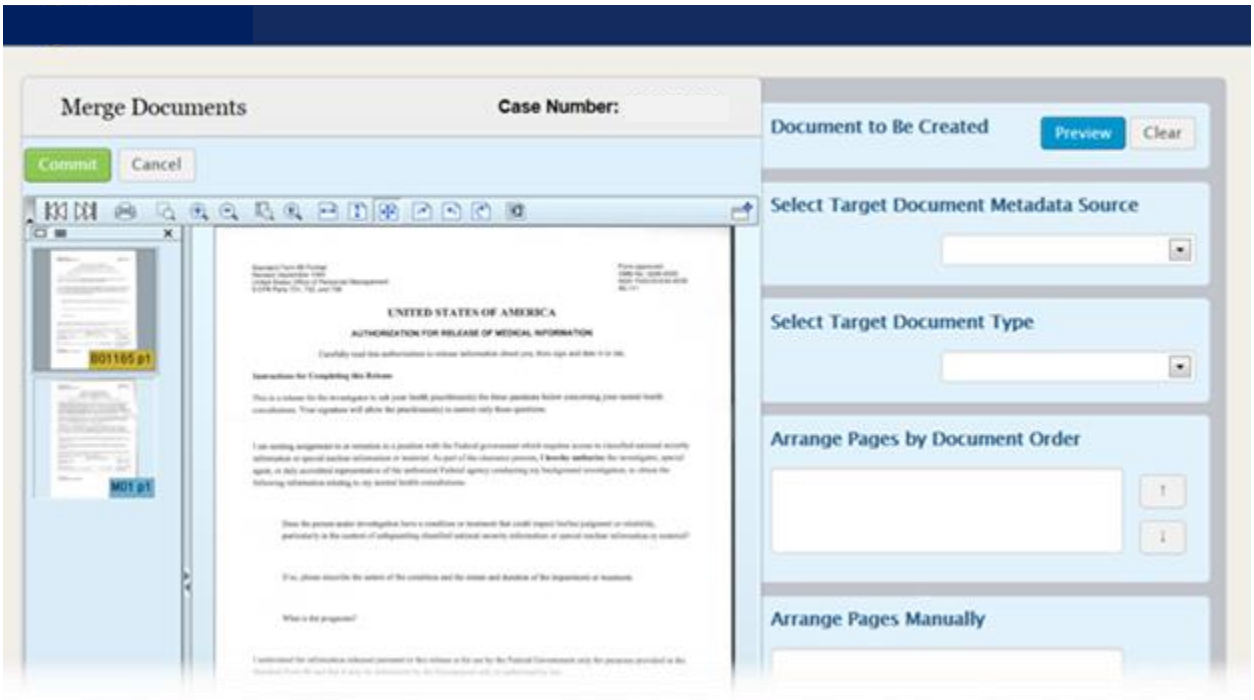
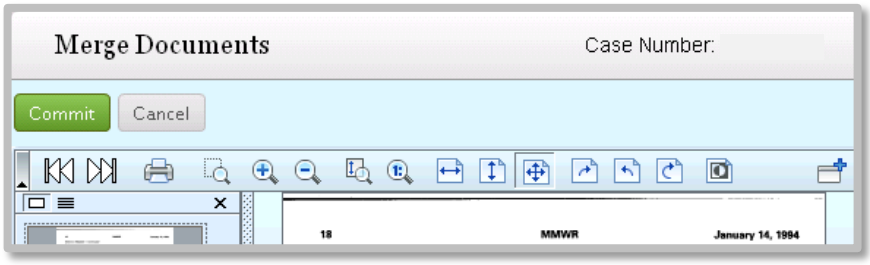
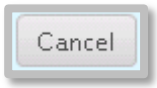


Figure 1-7. DDA Merge Function, New Browser Window with Daeja Viewer.



There are two main buttons on the Merge page; **Commit** and **Cancel**. One new target document is available when the Merge page is launched. The **Commit** button is selected after the target document has been completed and all pages are arranged. At any point, the user can select **Cancel** before selecting **Commit** to exit the Merge page and return to the DDA module home page without making any changes to the documents or storage location (repository).

After arranging the pages for the new target document, the document can be previewed, prior to committing the pages and saving the new target document.



When all actions are complete (that is, all pages have been ordered/reordered in the new target document and assigned a document type), click the **Commit** button.

1.17 Completing the Merge Function

After selecting **Commit** the user is returned to the DDA module home page with the initial search results displayed. The document that was just merged and committed to COMPANY will display in yellow. This is how the user can confirm the documents were merged and assigned the correct document type.

The original documents can be found in the **Trash Documents Storage Location**. Search by case number to retrieve the original document from **Trash Documents** to review or restore, as needed (this functionality is available to select roles and login permissions).

1.17.1 Summary of Steps for Merging Two or More Documents

- Search for or retrieve two or more documents (within the same case) from the **DDA Home** page. Select the documents to merge into one document.
- Select the **Merge** button from the Toolbar (this action launches the **Merge Document** browser window).
- Select the **Document Properties** from the drop down menu. The **Document Properties** available are one of the properties of the document type already assigned to one of the documents being merged. For example, S65, F62, AUB, and so forth.
- Assign a **Document Type** to the new target document from those available in the drop down menu.
- Arrange the pages as needed. Pages are arranged in the order the documents were selected by default. There is also an option to arrange pages manually. Both textboxes have up and down arrows to move pages. One page must be selected first, then the up and down arrows (to the right of the textbox) can be used to move the page as needed to change the order of the pages in the new target document.

- To preview the new target document contents prior to saving and committing the changes, select the **Preview** button (top of screen).
- To reset all the document options, select the **Clear** button, located next to the **Preview** button (top of screen).
- At any point prior to saving and committing the changes to the system, the **Cancel** button can be selected which will return the user to the **DDA Home** page where the user's initial search results will be displayed.
- When all pages have been arranged and assigned a document type in the new target document, select the **Commit** button.
- A system message will display indicating the merge operation is in progress.
- The new document will be available to retrieve through a search (using case number or other search criteria) on the **DDA Home** page.
- The original collection of multiple documents will be saved and available to restore if needed in the **Trash Documents** Storage Location.

1.18 Restoring a Document in DDA

The **Restore** feature in the DDA module allows for original documents that have been modified through the **Split** or **Merge** functions to be restored from the **Trashed Documents Storage Location** to the **Open Case Storage Location**.

Documents that were modified in a Split or Merge operation are retained in their original format in the Trashed Storage Location. The original document(s) can be searched for using **Advanced Search** panel on the right side of the page using a variety of search criteria (Case Number, Last Name plus a secondary search field, Social Security Number, e-QIP Request Number, and COMPANY Storage Location, which includes: All Authorized Locations, Unacceptable, Open, Closed, Document Review, and Trash Documents).

After entering search criteria (case number or last name plus social security number or e-QIP request number, and so forth), click the **Search** button (bottom right of Advanced Search panel). To start over with different search criteria, select the Clear button (bottom right of page next to the **Search** button).

1.18.1 Summary of Steps for Restoring Documents

- Search for or retrieve a document from the **Trashed Storage Location** on the **DDA Home** page using known search criteria.
- Select the document(s) to be restored.
- Select the **Restore** button from the Toolbar.
- The newly restored documents will display with any other case documents in the **Open Case Storage Location**.
- The new documents can remain in the **Open Case Storage Location** or moved to a new Storage Location as needed.